

Eastern Interconnection Reliability Assessment Group (ERAG)

Strategic Plan

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Introduction

Overview

This document provides a strategy for accomplishing the scope of work as stated in Section 2 of the revised ERAG agreement executed in September 2016.

The major area of focus is on conducting and enhancing ERAG reliability assessments. The primary driver for this plan is to formulate the strategic objectives for ERAG to achieve its effort in independently assessing the Eastern Interconnection as a whole and identify any emerging reliability risks. ERAG strives to be the voice of reliability for the bulk power system for the Eastern Interconnection of North America.

The primary objective for this plan is to gain alignment among the six Regional Entities in the Eastern Interconnection (EI) for a unified reliability assessment strategy for the near future. This plan serves as a framework for determining the assessment studies and analyses to be conducted and for identifying measures of effectiveness in support of NERC's and the Regional Entity's long-term strategic plans and corporate goals. The work of ERAG may include stakeholder participation in certain efforts.

This strategic plan is designed to provide guidance for ERAG's annual plan. The plan will serve as a major driver to establish the annual work plans and as a determinant of specific goals, contributing activities, and metrics for the organization. In doing so, the core focus will always be on the mission. Also, ERAG will continue to emphasize the commitment to maintaining and enhancing the levels of consistency and alignment with NERC and the ERO as we continue to evolve and develop.

While we express tremendous confidence in this strategic plan as a driver and guide, we are also cognizant and respectful of the tremendous level of change that can occur in a short period of time. We commit to revisiting this plan at least once every year to ensure we are adapting our efforts, as needed, to the changing environment.

Mission

To preserve and enhance the bulk power system reliability within the Eastern Interconnection. In doing so, we are committed to supporting the efforts of and serving as an extension of the North American Electric Reliability Corporation (NERC) in its mission as the Electric Reliability Organization (ERO) to ensure the reliability of the bulk power system within the Eastern Interconnection.

Vision

To be recognized as the trusted and credible technical resource that leads the independent analysis, assessment, and enhancement of bulk power system reliability for the Eastern Interconnection.

Guiding Principles

The following guiding principles are institutionalized and confirmed in this strategic plan. They are consistent in spirit, if not exact words, with those of the ERO and will continue to guide our philosophies, practices, and efforts in the future.

- **Independence:** a culture of independence assuring technically sound reliability assessments in reporting on the overall reliability, adequacy, and associated reliability risks that could impact the short-term and the long-term planning horizons in the Eastern Interconnection.
- **Focused:** reliability assessments focused to identify the limitations and vulnerabilities of the Eastern Interconnection and any other emerging reliability risks and/or concerns that may require further in-depth analysis.
- **Leadership:** establishment of reliability leadership for the Eastern Interconnection and to enhance reliability through effective outreach and communications with NERC and the ERO to coordinate reliability assessment efforts.
- **Effectiveness and Efficiency:** commitment to using our resources in the most effective and efficient manner to fulfill our mission.
- **Fairness and Openness:** commitment to conducting ERAG activities fairly, and openly and transparent as possible so as also to be independent. However, proper due diligence will be given to protecting the confidentiality afforded the registered entities in protecting critical information.
- **Inclusiveness:** embrace an inclusive philosophy with respect to being independent for participation in ERAG efforts.
- **Collaboration:** ERAG collaborates with the ERO-RAPA on modeling work as well as studies and assessments as designated by NERC for the EI. ERAG provides assurance that steps are in place to develop the necessary power-flow and dynamics cases following a system event.
- **Accountability:** ERAG reports to the Regional Presidents who approve ERAG budgets and work plans. ERAG will make periodic reports to the Regional Presidents on their activities.

ERAG Governance

The ERAG governance is covered under the ERAG agreement (see Appendix 1). Section 3 of the Agreement covers the governance, including structure of the Group, representatives, meetings, quorum and voting, and attendance. Section 4 of the Agreement covers officers of the Group.

Goal 1 – Periodic and Special Reliability Assessments

Goal Description

ERAG will review periodic and special reliability assessments performed by Planning Coordinators or other entities to identify key reliability issues and the risks and uncertainties affecting adequacy and security of the Bulk Power System (BPS) in the Eastern Interconnection.

Contributing Activities

- Include in Annual Work Plan.
- Oversee and facilitate the Planning Coordinators' process to ensure common methods and assumptions are used for the periodic and special reliability assessments prepared by Planning Coordinators in the Joint Area; such that the interconnection seams are aligned
- Ensure that data and information collected, analyzed and provided to NERC are in support of the development of reliability assessments, in accordance with the NERC Rules of Procedure.
- Review the results of the Planning Coordinators' methods and assumptions used to appraise the performance of the system and establish expectations and requirements for the assessments prepared by Planning Coordinators in the Joint Area; such that the interconnection seams are aligned.
- Establish any subgroups necessary to perform the work, which may include Planning Coordinators.
- Review assessments prepared by entities other than the Planning Coordinators (e.g., DOE National Labs, independent contractors, etc.) that are applicable to the EI.

Metrics

- Metric 1: Annual Work Plan
- Metric 2: Consistency of Modelling Methodology and Assumptions
- Metric 3: Review Planning Coordinator coordination and assessments
- Metric 4: Assessment Transparency (i.e., publically available)
- Metric 5: Common and Comprehensive Reports for the EI

Goal 2 – ERAG Reliability Assessments

Goal Description

ERAG will conduct its own assessments to identify key reliability issues and the risks and uncertainties affecting adequacy and security of the Bulk Power System in the Eastern Interconnection.

Contributing Activities

- Include the scope(s) of analyses, studies, and/or assessments in the Annual Work Plan. Specifically, the Plan will include a list of assessments for ERAG to consider.
- Participate with ERO-RAPA in the identification and review of special reliability assessments conducted independently by ERAG in the Joint Area, including evaluation of special and/or emerging issue studies, contingency selection and results and other studies as necessary.
- Conduct EI assessments as identified by the ERAG to comprehensively assess reliability in the Eastern Interconnection or applicable sub areas of the Eastern Interconnection.
- Facilitate communications to coordinate ERAG activities with PCs and ERO-RAPA.
- Establish any subgroups necessary to perform the work, which may include representatives from Planning Coordinators and other Registered Entities.

Metrics

- Metric 1: Annual Work Plan
- Metric 2: Address current and emerging risks in the EI as identified by ERAG and/or other sources, such as the NERC RISC
- Metric 3: Assessment Transparency with NERC and stakeholders
- Metric 4: Common Methodology and Assumptions

Goal 3 – Oversee MMWG

Goal Description

Oversee the development of Eastern Interconnection-wide planning cases through the work of the Multiregional Modeling Working Group (MMWG), such as power-flow, dynamics, and collection of short circuit model.

Contributing Activities

- Review all process changes made by the MMWG to ensure they are consistent with the requirements in the designee agreement.
- Ensure that all of the Planning Coordinator models are included.
- Direct the MMWG on modeling specific case development and special projects for the Eastern Interconnection

- Monitor the progress of the case assembly process to ensure it remains on schedule.
- Review, approve, and execute all contracts with third party vendors for necessary work to complete all cases.
- Provide funding for all necessary third party contracts.
- Regional staff to serve as a liaison representative to the MMWG. Liaisons are expected to attend all regularly scheduled MMWG meetings.

Metrics

- Metric 1: Annual Schedule
- Metric 2: Data Checks
- Metric 3: NERC Case Quality Assessment

Goal 4 – Event Analysis Models

Goal Description

Pursuant to Eastern Interconnection Events Analysis Model Building Plan (See Appendix 2), ERAG will collaborate with NERC to facilitate agreed upon steps to develop the necessary power-flow and dynamics cases following a system event.

Contributing Activities

- During the investigation of an event, NERC, EI Regional Entities, and Respective entities (comprised of EI Reliability Coordinators (RCs), Balancing Authorities (BAs), and Transmission Operators (TOPs)), will work closely together and follow the processes and procedures detailed in the NERC Events Analysis Process document, and any EI Regional Entity event analysis process document as well as the Eastern Interconnection Events Analysis Model Building Plan.
- Measure the effectiveness of processes and procedures set in place and make any necessary changes recommended from a validation effort

Metrics

- Metric 1: Monitor activities surrounding event model case development following a system disturbance
- Metric 2: Measure the effectiveness of processes and procedures set in place.

Appendix 1: Eastern Interconnection Regional Entity Assessments and Model Building Agreement



Appendix 2: Eastern Interconnection Events Analysis Model Building Plan



Version History

Version	Date	Action
0	December 15, 2016	Approved by ERAG